



COMPLETE CARE

Standard Operating Procedure

Procedure Title:	Lifestyle Management Health Coach
Date:	2/20/2026
Version:	1.0
Department:	Front and Back Office
Approved By:	Cece Carvajal

Program Overview

The Lifestyle Management (LSM) Program is a 6-month structured health coaching program led by foundational health specialist Heidi.

Program Structure:

- 6 total in-person visits (1 per month for 6 months)
- Weekly check-ins with Heidi by phone
- Patients may schedule additional visits if desired and/or recommended by Heidi
- Visits are double-booked with PCP schedules

Scheduling Guidelines

Initial Scheduling

- When scheduling the first appointment, automatically schedule all 6 monthly visits
- Patients may schedule additional appointments beyond the initial 6 visits.
- Patients are double-booked onto *their* PCP schedule

Non-PCP Patients

- Patients referred who are NOT established PCP patients:
 - Do NOT need to establish care
 - May participate in LSM program
 - Should be evenly dispersed onto provider schedules

Provider Exclusion

- Shayna Richards is excluded from scheduling LSM follow-ups
- If patient is seen in:
 - Eagle Point → Schedule with Denise
 - Medford → Schedule with any available provider

Medicare/Medicaid

- Pass waitlist for lifestyle & nutrition only – waitlist for PCP services.

Pre-Visit Patient Requirements

Prior to the first appointment:

- Patient must complete their health note
- Patient will receive a welcome email with:
 - Required apps to download
 - Program instructions

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- Next steps to complete before visit
- Staff must verify patient's email address

Billing Information

Insurance Billing

- Visits are billed as an office visit
- Patient responsibility (copay/deductible) depends on insurance coverage

Cash Pay Option

- \$150 per month 6 months, \$175 for 3 month, \$125 for 1 year.
- Applies to patients choosing not to use insurance or self pay
- Does not schedule with provider if self pay

Supplies for Purchase

Patients may purchase a Bundle Pack (\$25) including or can be purchased separate:

- Food scale \$20
- Measuring tape \$5

Day-of-Visit Workflow

Step 1: Front Desk Check-In

- Check patient in on Heidi's schedule ONLY
- Patients are sent upstairs to Health Coach
- Health Coach completes visit and then escorts patient back to reception
- Reception checks patients in on provider's schedule and let's patient know which floor they are on.

Step 2: **Medical Assistant Responsibilities**

The Medical Assistant will:

1. Retrieve LSM form
2. Room patient
3. Obtain vitals:
 - Weight (if not already obtained by Heidi)
 - Blood Pressure
 - Pulse/O2
 - Temperature
4. Record vitals:
 - Write on LSM form using dry erase marker
 - Enter vitals into patient chart
5. Do not use ROS. No need for medication reconciliation.
6. **Notify patient clearly:**

"This is NOT a PCP visit. This is a quick recap of your Health Coach visit. If you need to discuss additional concerns, we can get you scheduled for a follow up."

It is critical to communicate:

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- This is not a comprehensive PCP visit
- Concerns outside LSM must be scheduled separately

Location & Schedule

Heidi's Schedule:

-  Medford:
 - Every Tuesday
 - Every other Wednesday
 - Every Thursday
-  Eagle Point:
 - Every other Wednesday

Ensure correct location scheduling alignment.

Important Reminders

- Double-book onto PCP schedule
- Exclude Shayna Richards from LSM follow-ups
- Verify email before first visit
- Schedule 6 visits at initial booking
- Non-PCP patients do not need to establish to participate in program